



Good Morning and thank you for attending this lecture. This morning I will be presenting Connecting Staff Skills to Performance Reviews, a project at the University of South Florida Tampa Library. I hope that sharing our experience will be informative and may help others who are facing similar issues.

Conference Abstract: The University of South Florida (USF) Library initiated a task force to develop a listing of skills needed by staff personnel within the library. This task force was able to draw from several sources to recognize some core competencies needed within the library. This effort highlighted the need for the library to develop a correlation between these competencies and how staff members will be evaluated. The Performance Indicators document was developed to facilitate this. The last step of the task force was to translate this information into a program for evaluating staff, an on-boarding process for training new staff members and a plan for current staff members to become fully trained in the skills required for their job. This presentation will show the process the task force went through to develop these critical documents and discuss the experience of the management team to implement it. The discussion will cover the staff's reaction to these programs. The successes and challenges of the program after 1 year of implementation will be presented with the goal of providing participants with the chance to see possibilities for using USF's experience to help their libraries to develop their important staff resources.

Preface



Dennis J. Smith, Manager, Access Services
Presenting

USF Library Competencies and Skills Assessment Task Force (Core Competencies) Task Force

Gabriella Harmon, Manager, Talent Management
Jessi Hurd, Manager, Technical Services
Nancy Jacobs-Dilley, Human Resources Coordinator
LeEtta Schmidt, Manager, Interlibrary Loan
Dennis J. Smith, Manager, Access Services

First, I would like to introduce the team that help make this project a reality. My name is Dennis Smith and I am the Manager of Access Services at USF. The team that put together the work I will be presenting was called the Competencies and Skills Assessment Task Force. The short title was Core Competencies Task Force. We had three of the Managers at USF, Jessi Hurd, Manager of Technical Services, LeEtta Schmidt, Manager of Interlibrary Loan and myself. Our taskforce included the HR Coordinator for the Library, Nancy Jacobs-Dilley and a representative from the University's Talent Management Department, Gabriella Harmon. The project began over a year and a half ago and we began implementation about a year ago. I will also be sharing the implementation of our work and reflection on this project.

Background



Issues Identified for the Task Force

- Out of Date Job Descriptions
- Out of Date Job Postings
- Lack of Training Program for New Hires

Other Issues

- Inconsistent Job Performance Evaluations
- Lack of Clear Guidelines for Staff Performance Expectations

The Task Force was charged with identifying skills and competencies for library staff. The issues the library faced were as long term employees retired, each job description and job posting had to be rewritten from scratch as many of these had not been update in many years. In addition, HR found that even though the University has some basic guidelines, the departments had very different job descriptions even with similar positions. In addition to this, the library lacked a formal on-boarding program. Our plan was to identify skills, staff responsibilities, training and evaluation of training. Other issues that surfaced evolved around employee evaluations. How many here enjoys writing Employee Evaluations? These other issues influenced some of the work we accomplished.

Scope



Tasks To Be Completed

1. Skills List for Staff
2. Skills Database
3. Core Competencies
4. Skills Training Plan

Tasks Added

1. Performance Indicators
2. Implementation of Performance Indicators

Initially, we identified four task that we would tackle. Which evolved around the skills lists and core competencies.

But as we began our work, we identified the need to address staff performance along with the other important areas. This is the part of the project that I will focus on today.

Process



Focusing on Skills

- Skills Database
- Skills Questionnaire
- Training Checklist
- Learning Plan

As we began our project, we developed a skills database to identify skills required in a department and across the library. We also developed questionnaires that could be used by supervisors and employees to evaluate their skill levels. This questionnaire is then compared a checklist to determine if the staff member requires additional training to bring their skill level up to the level identified in the checklist. Lastly, we used a university standard learning plan to facilitate the staff member achieving full competency in their position. Here are examples of this process.

Process Examples



Appendix B: Skills Database Database Skills Example

skill 7/7,

ID	SkillType	Skill	Unit
110	Applied Knowledge	050	Cataloging
111	Applied Knowledge	090	Cataloging
127	Applied Knowledge	Account Research	Access Services
222	Applied Knowledge	ADA	AllLibrary
63	Applied Knowledge	Affect of Humidity on Different	Preservation
62	Applied Knowledge	Affect of Temperature on Differ	Preservation
82	Applied Knowledge	Arriving	Acquisitions
112	Applied Knowledge	Assign Subject Headings (LC)	Cataloging
91	Applied Knowledge	Assigning Dewey	Cataloging
92	Applied Knowledge	Assigning Library of Congress	Cataloging
68	Applied Knowledge	Attention to Detail	AllLibrary
141	Applied Knowledge	Authentication	Electronic Resources
98	Applied Knowledge	Bibliographic Changes	Serials
99	Applied Knowledge	Binding	Preservation, Serials
54	Applied Knowledge	Binding Practices	Preservation
130	Applied Knowledge	Book Search Processes	Access Services, Interlibrary Loan
228	Applied Knowledge	Calendar Maintenance/ Scheduling	Access Services, HR/Admin, Building Sel

The example here is of our skills list database. As we developed the skills list, we classified them by Skill Type. Then we identified the skill and assigned it to the Unit. Later in the process, we identified the level of each skill for each position in a different table.

Process Examples



Appendix D: Training Reports

Skills Inventory Questionnaire Access Services Sample

Access Services Skills Questionnaire

Friday, July 15, 2011 Employee Name:

Below, you will find a list of skills identified as important for library staff in Access Services. Please use the assessment levels table here to rate yourself by circling the level next to each skill that best reflects your abilities.

Level	Title	Description
0	Unaware	Have no knowledge of this skill and am unable to perform tasks that require this skill
0+	Unaware transitional	Have some knowledge but unable to perform task without further training
1	Aware	Have knowledge of this area and am familiar with concepts related to the skill but cannot perform task without supervision and/or further training
1+	Aware transitional	Am currently being trained in this area, but cannot perform the task without supervision
2	Functional	Able to apply knowledge and skills to routine work, but occasionally need help with exceptions to rules and problems
2+	Functional transitional	Able to perform task with little help or guidance from others, and need less help with rule exceptions and problems
3	Proficient	Have extensive knowledge in this area and am able to work through most problems and complex issues with help or guidance from others
3+	Proficient transitional	Am able to train others in this area
4	Expert	Have extensive knowledge and experience in this area and act as a coach and mentor to others helping to solve difficult and complex problems

Applied Knowledge	Account Research	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	ADA	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Attention to Detail	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Book Search Processes	0	0+	1	1+	2	2+	3	3+	4
Applied Knowledge	Calendar Maintenance/Scheduling	0	0+	1	1+	2	2+	3	3+	4

Here is a sample questionnaire for an Access Services staff member and the supervisor. This questionnaire allows the employee to assess their level in each skill as well as the supervisor assessing the staff member's skill level. We used a 0 to 4 scale as our model.

Process

Examples



USF UNIVERSITY OF SOUTH FLORIDA libraries		Access Services LA Training Check List			
Thursday, June 02, 2011		Employee Name:			
Level	Title	Description			
0	Unaware	Have no knowledge of this skill and am unable to perform tasks that require this skill			
0+	Unaware transitional	Have some knowledge but unable to perform task without further training			
1	Aware	Have knowledge of this area and am familiar with concepts related to the skill but cannot perform task without supervision and/or further training			
1+	Aware transitional	Am currently being trained in this area, but cannot perform the task without supervision			
2	Functional	Able to apply knowledge and skills to routine work, but occasionally need help with exceptions to rules and problems			
2+	Functional transitional	Able to perform task with little help or guidance from others, and need less help with rule exceptions and problems			
3	Proficient	Have extensive knowledge in this area and am able to work through most problems and complex issues with help or guidance from others			
3+	Proficient transitional	Am able to train others in this area			
4	Expert	Have extensive knowledge and experience in this area and act as a coach and mentor to others helping to solve difficult and complex problems			
SkillType	Skill	LA 6mo	Complete	LA 1yr	Complete
Applied Knowledge	Account Research	2		3	
Applied Knowledge	ADA	2		3	
Applied Knowledge	Assessment / Mentoring	1		2	
Applied Knowledge	Attention to Detail	3		3	

Using the skill listing combined with a tables that identify a department and the skill level required of a particular staff position. The example above shows a Library Assistant (LA) in access services. The report shows the skills need for that position and the level required after 6 months in the position and the level required after 1 year.

Process

Examples



Learning Plan

Name:			Area:		
Date:			Name of Supervisor:		
Learning Objective:					
Actions			Target Date	Completed	
Criteria for Success:					

Here we see a sample of our learning plan that we developed in order to develop the staff member's skills to the levels listed on the previous report.

Process



Getting from Skills to Core Competencies

At this point, we had our listing of skills so we began to focus on core competencies. This is where we began to expand and add some additional tasks to our task force.

Process



Core Competencies Vs. Performance Indicators

- Core Competencies
 - Focused more on Librarians
 - Mainly tied to vision documents
- Performance Indicators
 - Very few examples
 - Not related to skills or competencies

As we conducted our research, particularly in Core Competencies, we examined programs within USF, other Universities, organizations and national programs such as the American Library Association's and ACRL's Core Competencies. We found that there has been extensive work done on Core Competencies for Librarians, but very few examples that focused on library staff. As we began to examine core competencies, we begun to realize the need within our organization to relate these competencies to employee's performance and evaluation. We found very few examples of performance being related to skills or core competencies.

Process



Developing Core Competencies

- Learn From Others
 - American Library Association's Competencies
 - Other National Organizations
 - Other Universities (York University)



**Couple our Competencies
with Performance Evaluations**

We started developing our core competencies from examples national organizations. One of our main sources of inspiration was a core competencies document from York University. It was this document's organization of core competencies that lead us to see how we could organize competencies into the areas that staff are evaluated on.

Process



Core Competencies and Performance Indicators

- Identified the Competencies Areas
- Identified the Competencies
- Developed Performance Indicators
- Brought in Other Library Managers
- Worked with USF Human Resources
- Proposed to the Library Administration and Management

Once we had this laid out, we began the task of developing this “master” document. We used the USF Evaluation to guide us in the areas to we would develop competencies. As we developed our documents, we began to draw in other departments and the library administration into our vision of a document that the library could use. We felt that we needed a document to guide us as a group without dictating how we evaluate each staff member. We also felt the need to bring up the skills and competencies of library staff that would be needed in the future for the library to be successful.

Process Examples



Ratings:

Exemplary

Commendable

Achieves

Needs Improvement

Unsatisfactory

Performance far exceeds all standards/expectations. Exceptional results are consistently produced.

Performance frequently exceeds standards/expectations.

Performance consistently meets standards/expectations. Requisite competencies and knowledge are demonstrated.

Performance does not consistently meet standards/expectations. Some requisite competencies and knowledge are demonstrated. Individual may still be learning the job and/or functions and requires additional time to develop.

Performance does not meet standards/expectations. Major deficiencies require immediate attention and improvement.

PERFORMANCE INDICATORS		Exemplary	Commendable	Achieves	Needs Improvement	Unsatisfactory
Job Knowledge: Demonstrates sufficient knowledge, competency, and understanding to perform all aspects of the job efficiently, effectively, and safely. Comments: <input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Productivity: Meets established deadlines and effectively uses work time to achieve goals and objectives; work effort results in the desired outcomes to include quality, quantity, and timeliness. Comments: <input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Quality of Work: Produces work that is comprehensive in scope, complete in detail, and accurate in content. Comments: <input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communications: Shares information effectively both verbally and in writing (including formal presentations) with various types of audiences; listens attentively and openly to the ideas, concerns, and suggestions of others. Comments: <input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Questions (813) 974-2970

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Human Resources / Employment Center/Appointments
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To illustrate, here is a copy of one of our evaluation pages which shows the Performance Indicators and examples of the ratings above.

Process Examples



Developed by the Core Competencies Task Force
for use in Annual and Semi-Annual Staff Evaluations.

November 22, 2010

1. JOB KNOWLEDGE

Optimal competencies to be demonstrated:

Demonstrates sufficient knowledge, competency, and understanding to perform all aspects of the job efficiently, effectively, and safely.

- ◆ Demonstrates a thorough understanding of the policies, procedures, practices, standards, or concepts associated with work assignment and appropriately applies them depending on the task or issue.
- ◆ Works within library guidelines, procedures, and/or best practices. Knows how to adjust or adapt methods and procedures depending on the result required.
- ◆ Seeks out and utilizes resources that are available when completing work assignments in an effort to increase job efficiency and effectiveness. (e.g. technology, information, financial and intellectual).
- ◆ Works to remain current in applicable field. Acquires technical knowledge by participating in meetings and training programs.
- ◆ Seeks out new learning opportunities by participating in work assignments or special projects that will require expansion of core competencies. Incorporates new learning into work plans and activities going forward.
- ◆ Looks for opportunities to share knowledge by assisting others with work related problems or issues. Demonstrates or explains occupational practices, ideas, or concepts and communicates their necessity.

Here is an example of our core competencies. If you notice our first core competency is taken directly from the Evaluation Form.

<div> <div>Process</div> <div>Examples</div> <div>USF</div> </div>	
Achieves:	Understands, has fundamental knowledge and skills to complete all job assignments. Accepts training when offered or occasionally requests training. Understands and contributes to the departmental and strategic goals for the library and university.
Commendable:	Has solid base of skills and knowledge to perform job assignment and routinely seeks out training to improve. Assists others with job assignments and occasionally helps train others in the department. Understands role in achieving USF's and the Library's strategic goals. Routinely seeks out ways to help achieve strategic goals.
Exemplary:	Has skills and knowledge far above current assignment's core competencies. Routinely uses them to assist the department and others with problems and issues. Actively seeks out projects, assignments, and/or training in an effort to enhance professional

2

Here is an example of the Performance indicator for Job Knowledge. We did write summaries for all five ratings, but I'm going to keep this on a positive note. Our goal was to incorporate the performance standards listed along with a way to describe the expected performance for that rating. Overall we completed a document that covered 10 core competencies areas, eight of which are on the evaluation and an additional two that we proposed would be incorporated into the library's evaluation system. The additional areas were Adaptability for all staff and Managing People which would relate to supervisors and staff with supervisory roles.

Implementation



Buy-In From Administration and Management

Conducted Training for Supervisors

Conducted Introduction Training for Staff

Incorporated Other Seminars That Supported Transition

When we completed the development of this document, we were very concise about how we wanted to implement within the library. Our goal was to introducing for the remainder of the current evaluation cycle and prepare the library for it's use during the following evaluation cycle.

Our first goal was to make sure we had complete buy-in from Management and the Administration that this is the direction we wanted to move in.

Second, we began training the supervisors on this program and introduced it to the staff. In addition to the formal training, our departments conducted one-on-one sessions with each employee after they had an opportunity to read over the document.

Lastly, we also had additional workshops conducted by the USF Talent Management which involved dealing with change, performance self-assessments and supervisors training in the evaluation system. These were done to support the transition and begin our culture change.

Results



Transition was Better Than Expected

First Round of Evaluations was Challenging

Communication on Performance and Skills

Fairness to the System

For many of the managers, we felt that the transition went a lot better than expected. There were concerns raised but many of the staff appreciated the openness of the system.

Our first round of evaluations were challenging as many staff experienced an “adjustment” from their previous evaluations.

We did realize a sharp increase in the communication between supervisors and staff on issues of performance and skills.

Many people felt pain with this system, but the greater majority did feel a stronger fairness and engagement with the system.

Results



One Year Later

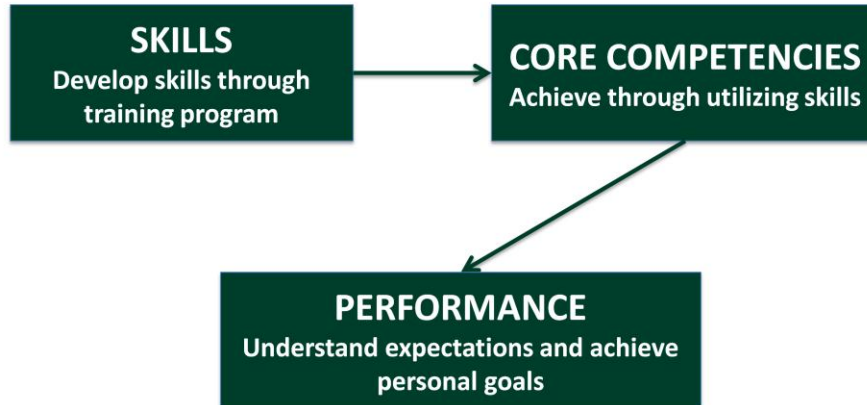
No one was surprised by their evaluations

The evaluation became one of many conversations about their performance

Staff now expect us to provide them with goals and feedback on a regular basis

Here are a few insights into our program after one year. When meeting with my staff members, none were surprised by their evals. This was mainly because it wasn't the first time we had discussed their performance over the last year. Now staff have come to expect goals and feedback on a more regular basis.

Conclusions



Conclusions



Setting the Bar Higher Often Encourages Growth

Important to Set Expectations

Strongest Component of the System is
Communication

Collaboration with Departments and
Administration is Imperative

Some lessons we learned. Giving staff a goal often encourages them to achieve it. Staff want to know what you expect of their performance. Communication is the key.

Work as a whole library.

Documents



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Core Competencies Task Force Report

Core Competencies and Performance Indicators

Presentation

Available at:

<http://works.bepress.com/dennisjsmith/>

The task force developed the skills database and documents as an enhanced tools for library supervisors and manager. This will provide some shared agreement and standardization with the library and increase library communication. These tools will also provide inventories of staff skills to facilitate a competent workforce focused on achieving the strategic goals of USF and the Library while contributing greatly to student success.